Intermediate Personal Tax Preparation

Enrol Risk Free
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www.knowledgebureau.com

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Knowledge Bureau®
Excellence in Financial Education
2003 Celebrating 15 years 2018

OF SPECIAL INTEREST TO:

- Those new to tax preparation
- Tax professionals for staff training
- Accountants and bookkeepers
- Financial advisory firms

- Prepare tax returns utilizing the best approach for the family as a whole
- Understand the mechanics and theory behind tax return preparation
- Achieve consistently accurate results, including up-to-date tax law changes

Study On Your Terms and Time in Our World-Class Virtual Campus

- Individualized study plans, instructor support
- 24/7 access to online lessons, quizzes
- Valuable e-journals, software, calculators
- Testing, accreditation and certification
- Easy pay plan customized to fit your budget
- Risk-free enrolment

How to Enrol in Your Self-Study Course Today

1. Enrol online at www.knowledgebureau.com
2. Scan and email the completed registration form to our Registrar at registrar@knowledgebureau.com
3. Call our Registrar toll-free at 1-866-953-4769
4. Fax your registration form to 1-204-953-4762

Free educational consultation available

*The RWM™, MFA™, DFA-Tax Services Specialist™ and DFA-Bookkeeping Services Specialist™ are registered certification marks of Knowledge Bureau™

Self-Study Application Form

For full curriculum details, see www.knowledgebureau.com

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INTERMEDIATE PERSONAL TAX PREPARATION

Tax preparation is always timely, as it is the taxpayer's legal right and duty to file a tax return for the entire family to the best benefit of the unit as a whole. But from a tax and financial planner's point of view, it is critical to know the mechanics of tax preparation as a prerequisite to tax efficient financial planning. If you don't know tax, you're missing double digit returns in your plans for real wealth management with your clients.

CONTENT DESCRIPTION & KEY CONCEPTS

This course introduces a proven process for consistently accurate T1 tax preparation services with a professional client interview and documentation management system, as well as a thorough understanding of tax preparation for the five anchor profiles upon which every personal tax return is based: credit filing, employees, families and children, investors and seniors.

CERTIFIED SKILLSETS YOU WILL LEARN

The course is perfect for new owner-managers who require a train-the-trainer manual, as well as new entrants into the tax preparation market including new seasonal staff in a busy tax accounting office. The course will train your staff on tax preparation services and includes the latest tax changes for the 2017 and 2018 tax years. Professional tax preparation and research software (student version) is included as one of the course components.

The student will be exposed to a broad range of personal income tax topics in common scenarios, each featuring short answer and true-to-life case studies which overview the basic elements of the tax return and the details behind claiming income, deductions and tax credits on most lines of the personal tax return. The student will be able to competently prepare basic personal tax returns.

COURSE COMPONENTS

MULTI MEDIA INTRODUCTION – Your virtual instructor overviews key concepts in each chapter.

KNOWLEDGE JOURNAL TEXTBOOK – A full course manual containing detailed study materials, chapter by chapter.

EVERGREEN EXPLANATORY NOTES – A comprehensive reference library.

PRACTICE MANAGEMENT THESIS – Your formal case study online: a great review before your final exam.

TESTING – Chapters end with multiple-choice quizzes and true-to-life cases. A comprehensive final exam is written at the end of your studies.

ACCREDITATION – Earn 30 CE/CPD credits per course.

STEP 1: STUDENT IDENTIFICATION

Name ______ Returning Student ID # ______

Company ______

Address ______

City ______ Province ______

Postal Code ______ Email ______

Phone with Area Code ______ Fax ______

Referred By ______ Current Designations/Licensing ______

STEP 2: TUITION FEES

☐ **Single Course Tuition Fee**	**$795**
☐ **Electronic Textbooks**	**No Extra Charge**
☐ **Hard Copy Textbooks and Delivery**	**$ 95**

OR

☐ **Choose Certified Skills Diploma or Designation Program and save**

See www.knowledgebureau.com for tuition funding options and details on qualifying for tax credits.

TABLE OF CONTENTS

Study Time: 30 hours

STEP 3: PAYMENT PLANS

☐ **Full Payment Plan** (Branch Office study groups save 10%):
Number of Courses: _______ **A** x fee from Step 2 = **B** below

TOTAL TUITION FEES:	$____________B
Hard Copy and Delivery (see step 2)	$____________C
SUBTOTAL (B + C)	$____________D
GST/HST (885004713RT001)	$____________E
TOTAL DUE (D + E)	$____________F

☐ **EZ-Pay Instalment Plan:** Call 1-866-953-4769 for details.

STEP 4: PAYMENT METHODS

☐ **CREDIT CARD:** ☐ Visa ☐ MC ☐ Amex Expiry Date ___ / ___

Card Number ______________________

Name on Card ______________________

Signature ______________________

STEP 5: REGISTRATION OPTIONS

Phone: 1-866-953-4769 **Fax:** 1-204-953-4762
Online: www.knowledgebureau.com
Email: registrar@knowledgebureau.com

☐ Unless box is checked, I provide consent for you to store my contact information and inform me of my progress and future educational opportunities.